

Global PV Demand Outlook 2015-2020:

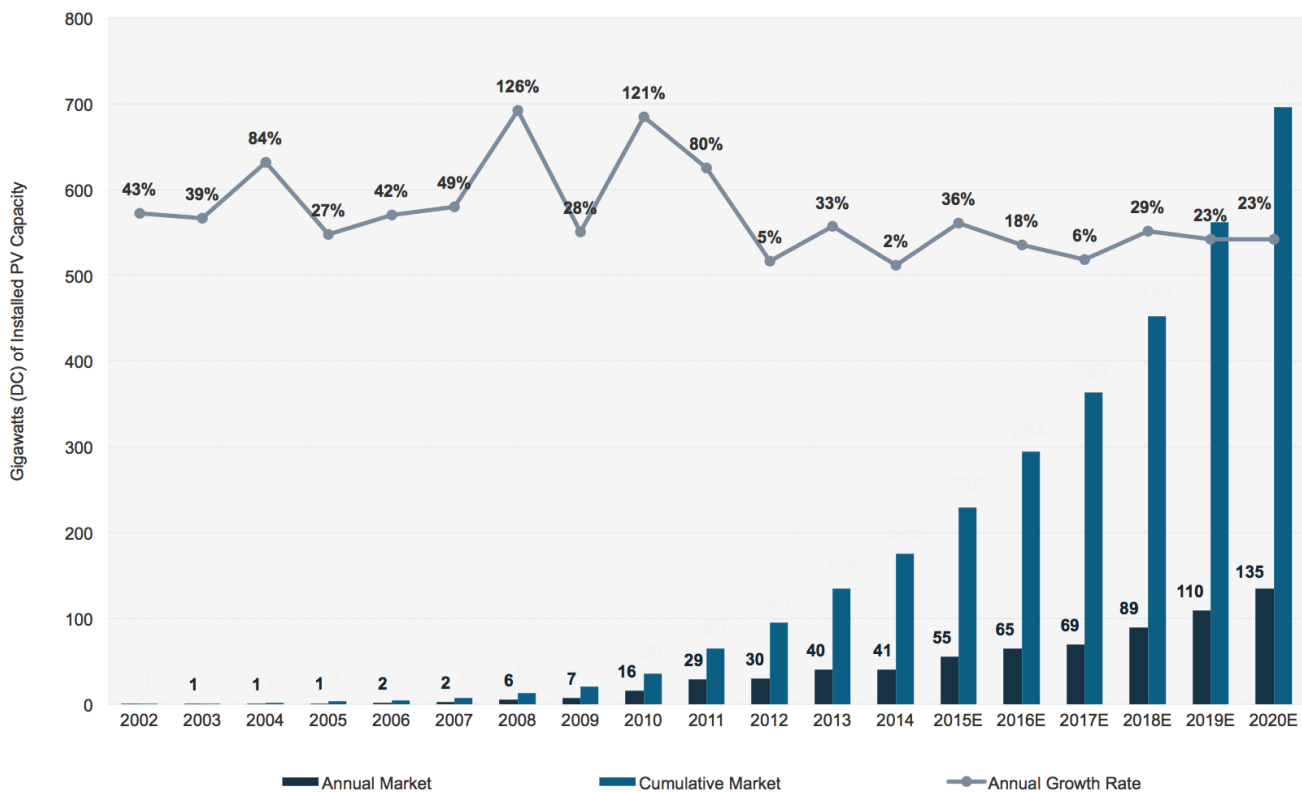
Exploring Risk in Downstream Solar Markets



Adam James | Analyst, Solar

The cumulative global market for solar PV is expected to triple by 2020 to almost 700 gigawatts, with annual demand eclipsing 100 gigawatts in 2019. Solar demand will likely be almost entirely market-based in 2020; a dramatic shift from 2012 when almost all demand was premised on direct incentives. One implication of an increasingly unsubsidized market is that management and governance of the electric grid will change dramatically, creating both new opportunities and challenges for solar companies. This transformation is already underway with the implementation of market-based mechanisms for PV procurement and solar companies exploring innovations in business model design.

Annual and Cumulative PV Demand (GWdc), 2002 - 2020E



Source: GTM Research

This slide-based report explores the high-level trends, drivers, and risks shaping global PV demand out to 2020. It includes forecasts and risk assessments for major markets, analysis of regional and emerging markets, alternative scenarios for global demand, and distillation of key themes such as unsubsidized market development, business model and financial innovation, and the regulatory transformations for the electric grid.

Regions covered in the report include:

Brazil | Chile | China | Germany | India | Japan | Mexico | Saudi Arabia | South Africa | Thailand | Turkey | United Kingdom | United States

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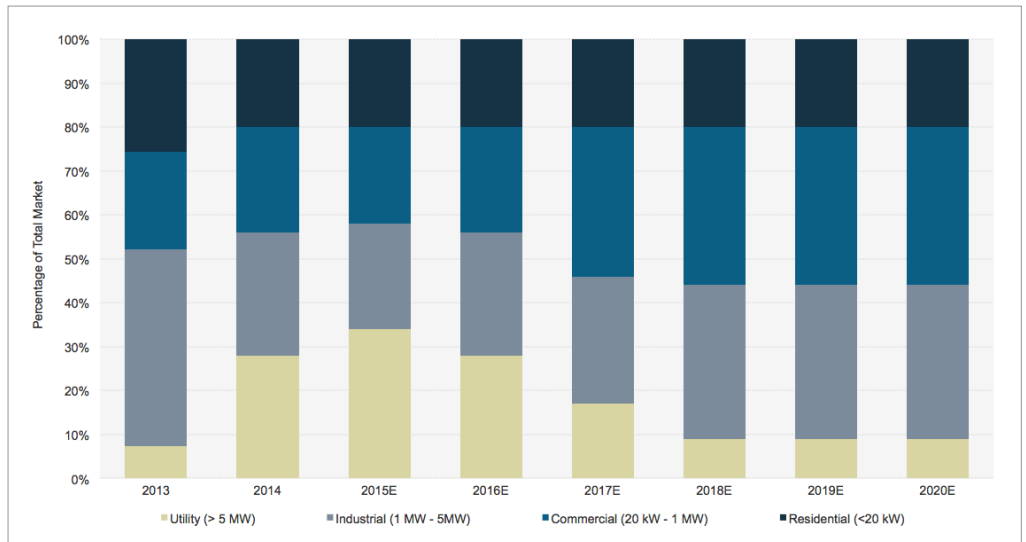
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Sample Figures

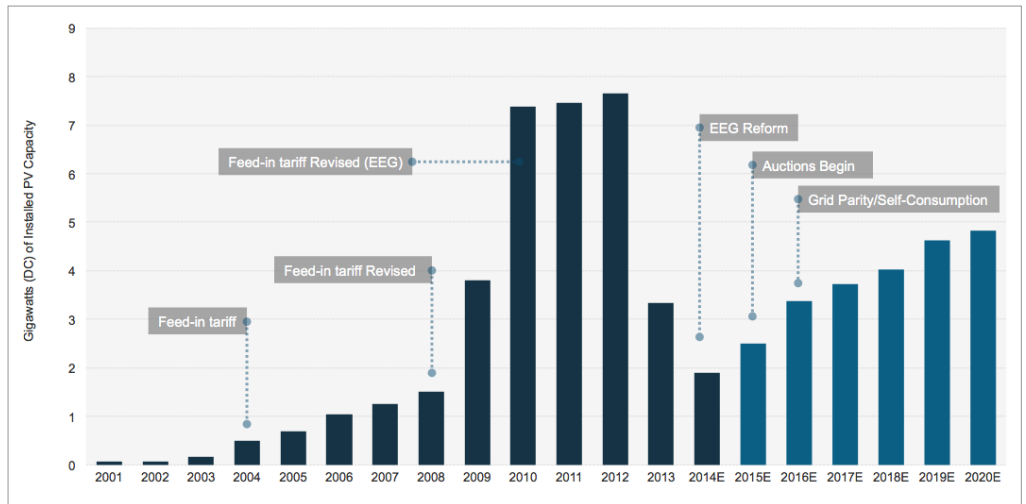
Japan Base Case PV Demand by Segment

Source: GTM Research



Germany Base Case PV Demand

Source: GTM Research



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